

# Telecommunications services Market survey Residential results

November 2024



Overall Scorecard



Mobile Services



Internet Services



Fixed Line Services



OTT Apps Services



ITU Services



Other Services

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Overall Scorecard



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# Objectives of the Telecommunications Services Market Survey:



Understand the access and usage for different telecommunications services in Bahrain



Giving an indication of consumer satisfaction with different telecommunications services



Identify the changes in consumer needs and find new trends in terms of telecommunications usage



Identify any market concerns and assist in its decisions to take appropriate regulatory action



Overall Scorecard



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OTT Apps Services



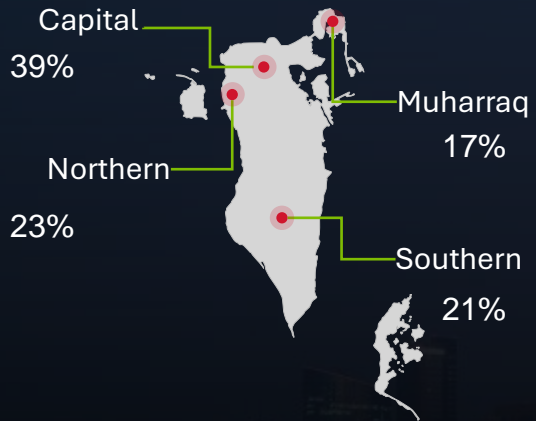
ITU Services



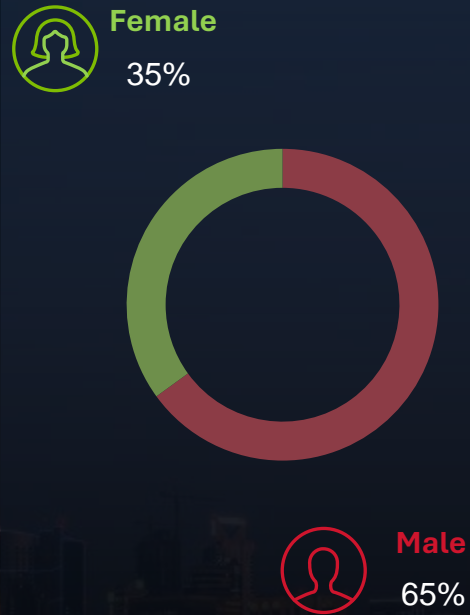
Other Services

# Sample Profile

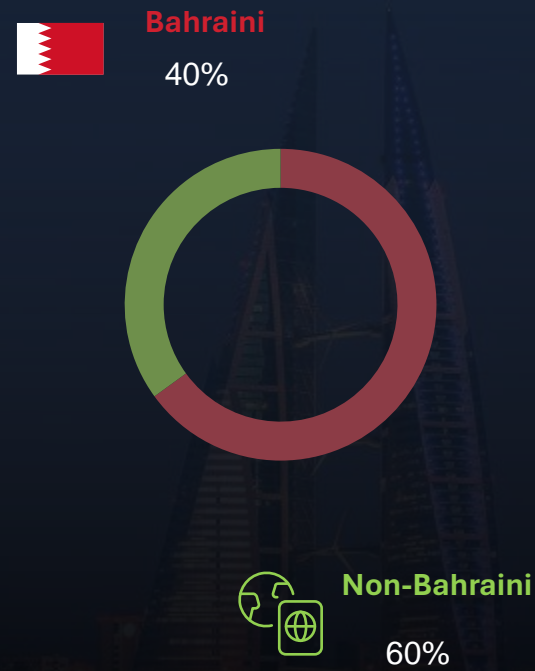
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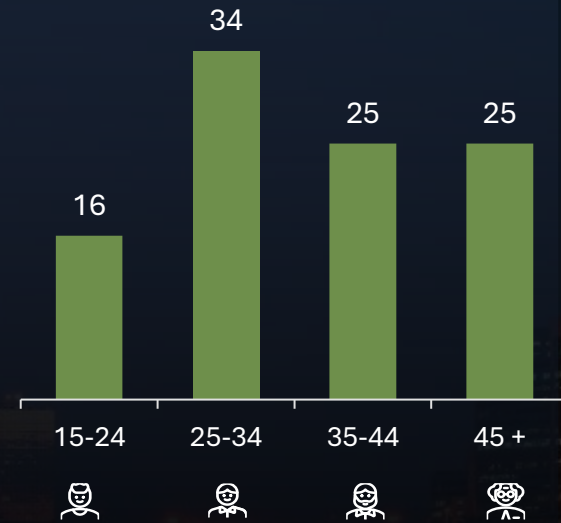
## Gender



## Nationality



## Age Group (%)



Sample Size: **1,516**

## Key Findings of the Survey

### Mobile Services



Access

100 %

Of respondents use Mobile services



Smart Phone Usership and  
Mobile Data users

100 %



Satisfaction

94 %

Top 2 Boxes



Mean Score

### Internet Services



Access

100 %

Of respondents have access to Internet at home



Usage

100 %

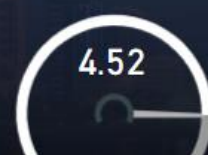
Of respondents used the internet in the last 3 months



Satisfaction

94 %

Top 2 Boxes



Mean Score

### OTT Apps Service



OTT Usage

100 %

Of respondents use OTT Apps



OTT Apps-international Calls

84 %

Of respondents use OTT Apps



Satisfaction

95 %

Top 2 Boxes



Mean Score

# Mobile Services



KPI  
Scorecard



Usage  
Summary



Satisfaction  
Scores



Improvement  
Suggestions



Overall  
Scorecard



Internet  
Services



Fixed Line  
Services



OTT  
Apps



ITU  
Services



6  
Other  
Services

## Mobile services Key findings



Access

100 %

All Access Mobile phones



Ownership

100 %

All own smart phones



International Calls

61 %

Of mobile phone users make International calls using their mobile phones



Satisfaction

Top 2 Box 94 %

Of respondents are satisfied with Mobile services

↕ Mobile Data

100 %

Of respondents use their mobile phone to access internet

↔ Switching providers

6 %

Of respondents switched their mobile phone provider in last 12 months



Overall Scorecard



Internet Services



Fixed Line Services



OTT Apps

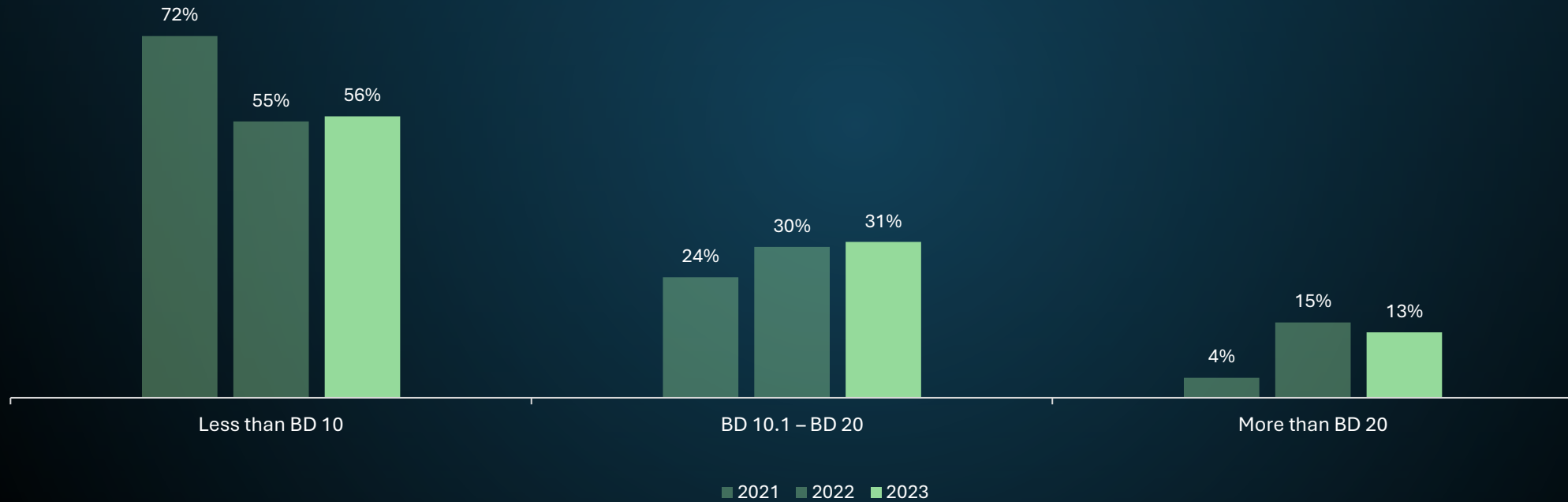


ITU Services



Other Services

# Mobile services - Spent summary



Average Monthly Spend on Mobile



Overall Scorecard



Internet Services



Fixed Line Services



OTT Apps



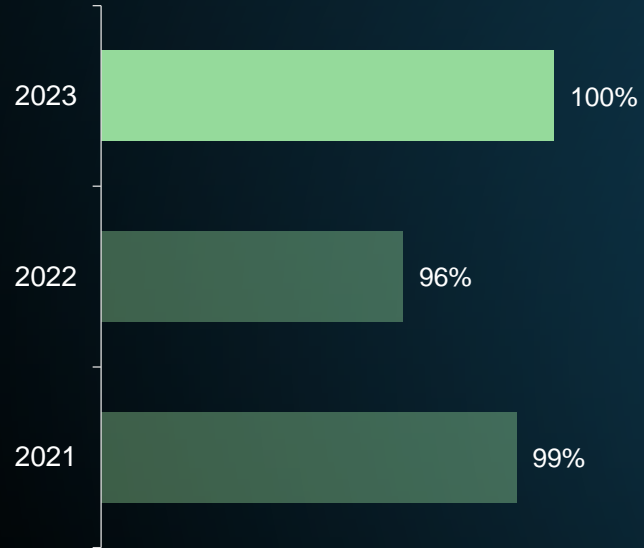
ITU Services



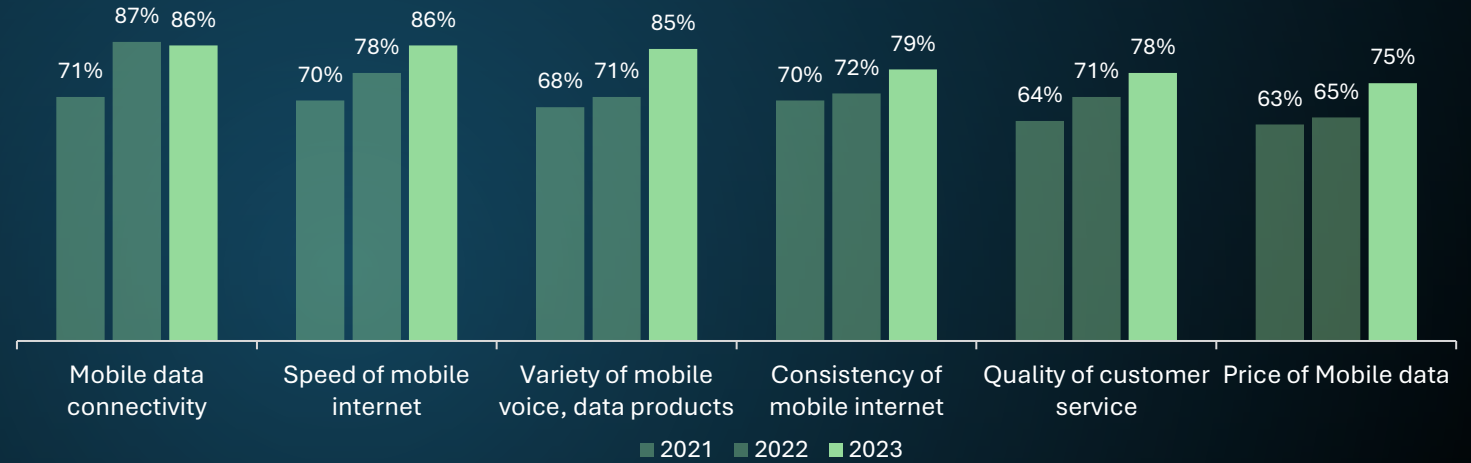
Other Services

# Mobile Data

Mobile data to access internet



Mobile Data satisfaction – Top 2 Box



Mobile services continue to have high satisfaction while improvement is seen on Speed, Pricing, and Packages



Overall Scorecard



Internet Services



Fixed Line Services



OTT Apps



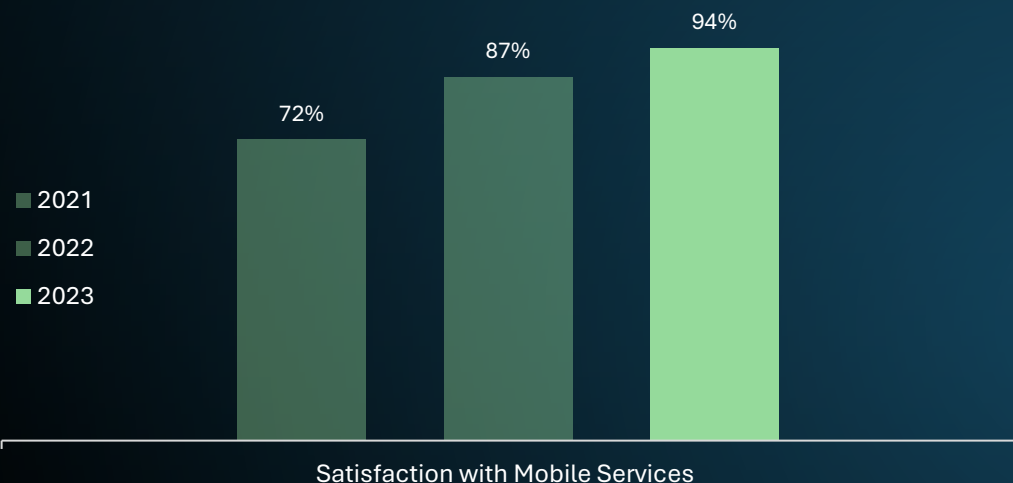
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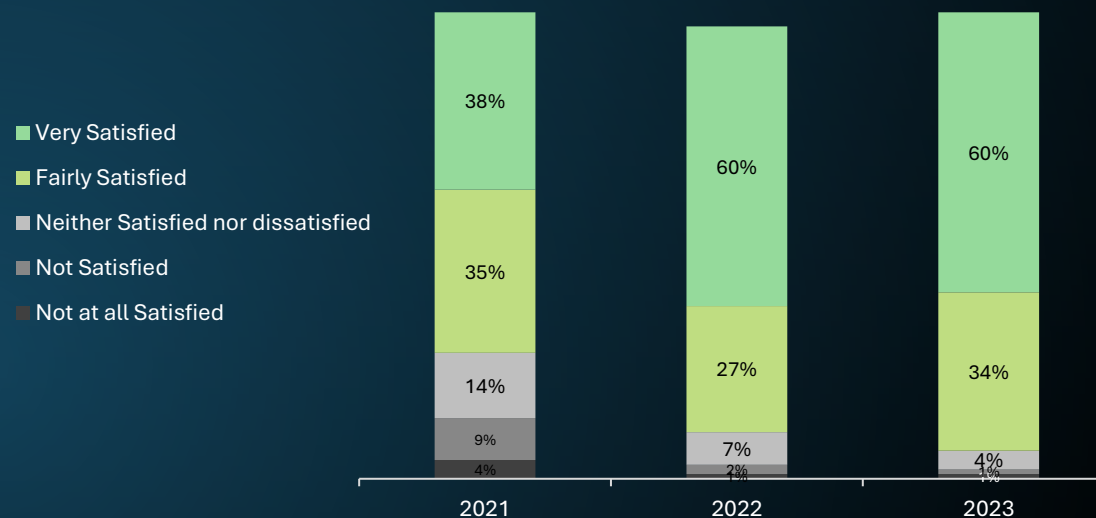
Other Services

## Satisfaction with Mobile Services (1/3)

Overall Satisfaction – Top 2 Box



Overall Satisfaction – Satisfaction Score



Mean Score

	2021	2022	2023
Overall Mobile Service	3.92	4.45	4.55



Overall Scorecard



Internet Services



Fixed Line Services



OTT Apps



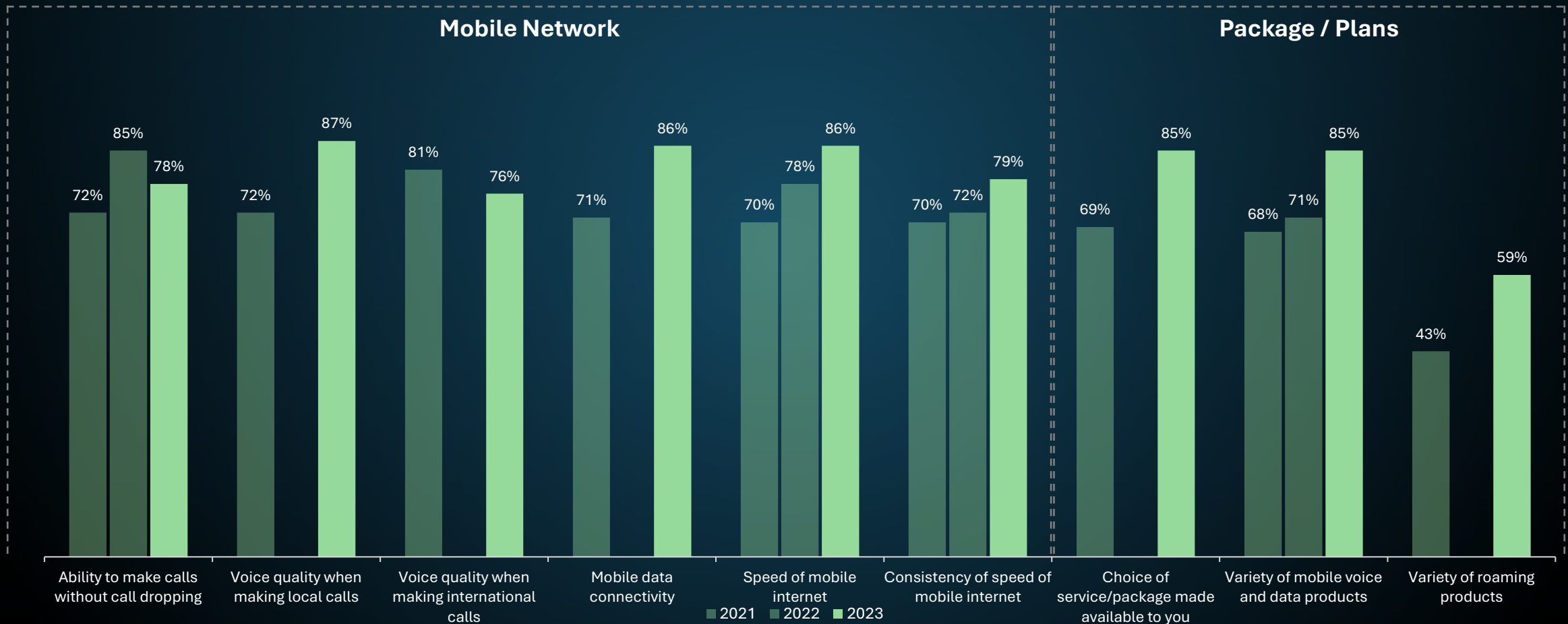
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10 Other Services

## Satisfaction with Mobile Services (2/3)

### Top 2 Box



Overall Scorecard



Internet Services



Fixed Line Services



OTT Apps



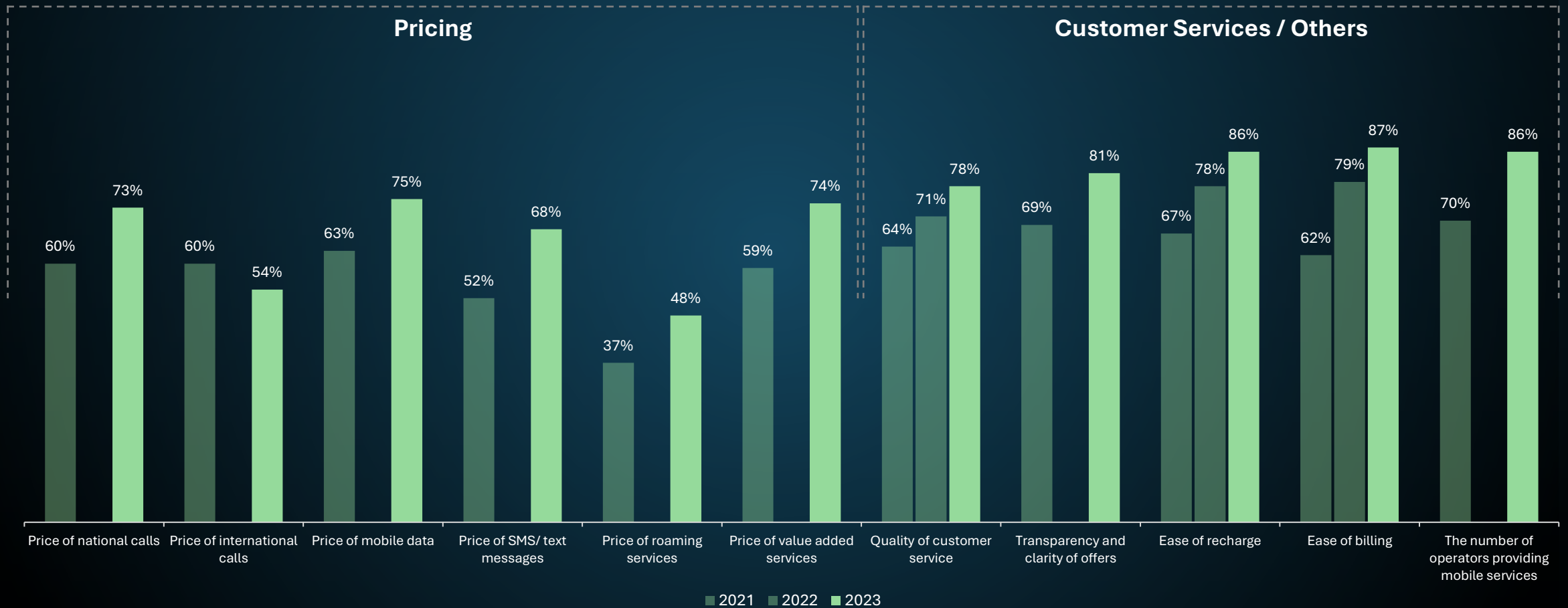
ITU Services



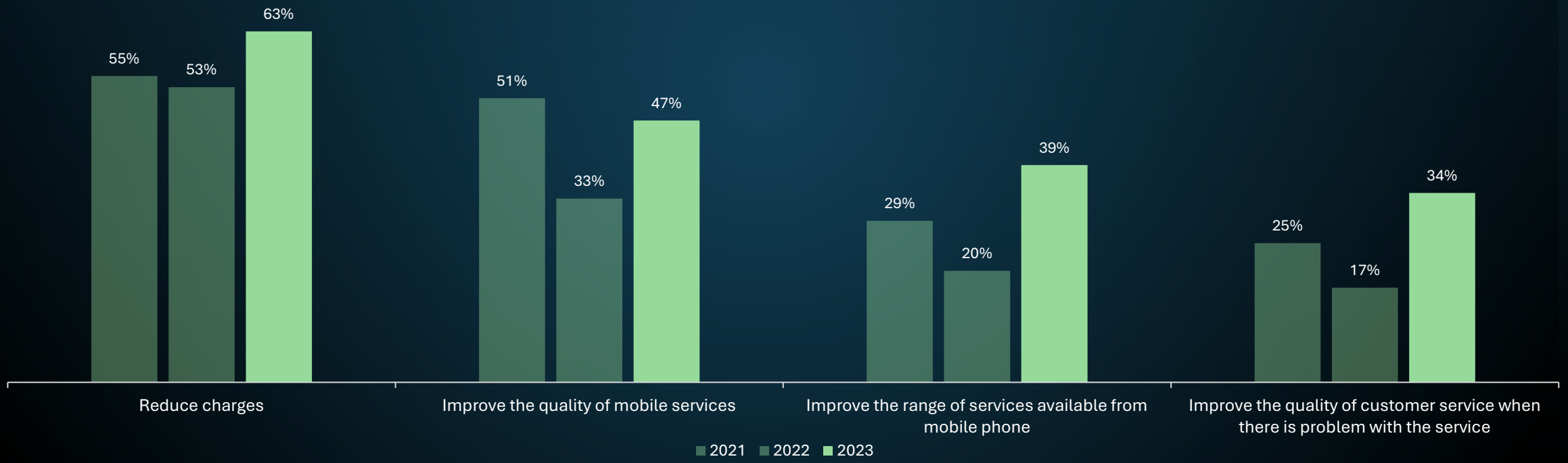
11 Other Services

# Satisfaction with Mobile Services (3/3)


## Top 2 Box



## Suggestions to Improve Mobile Services





# Internet Services

  
KPI  
Scorecard

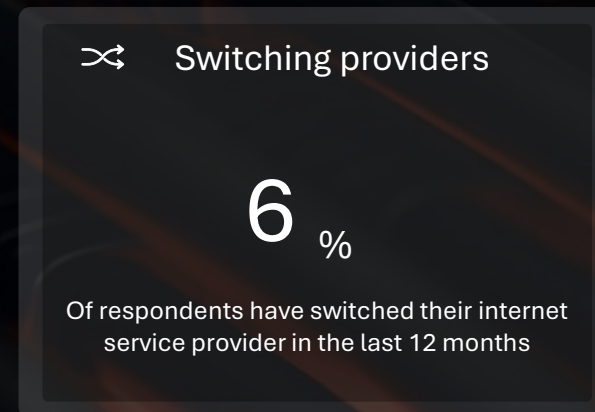
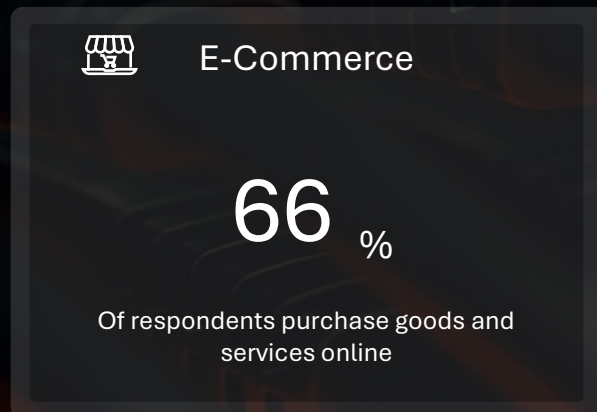
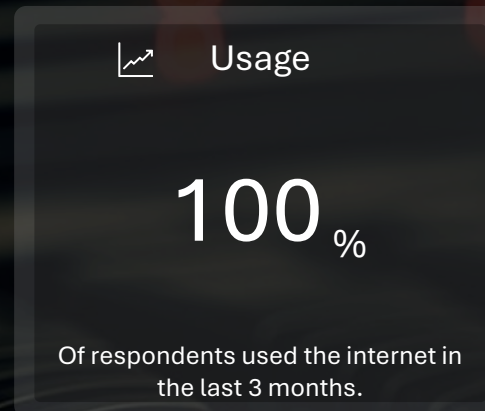
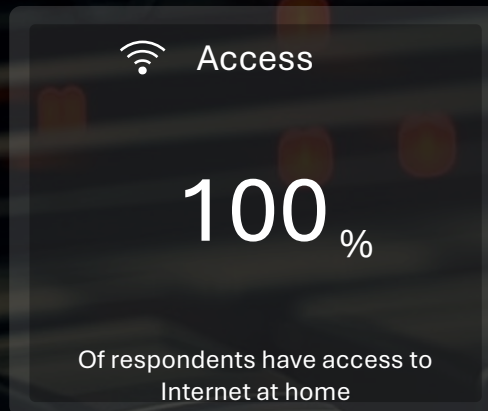
  
Usage  
Summary

  
Satisfaction  
Scores

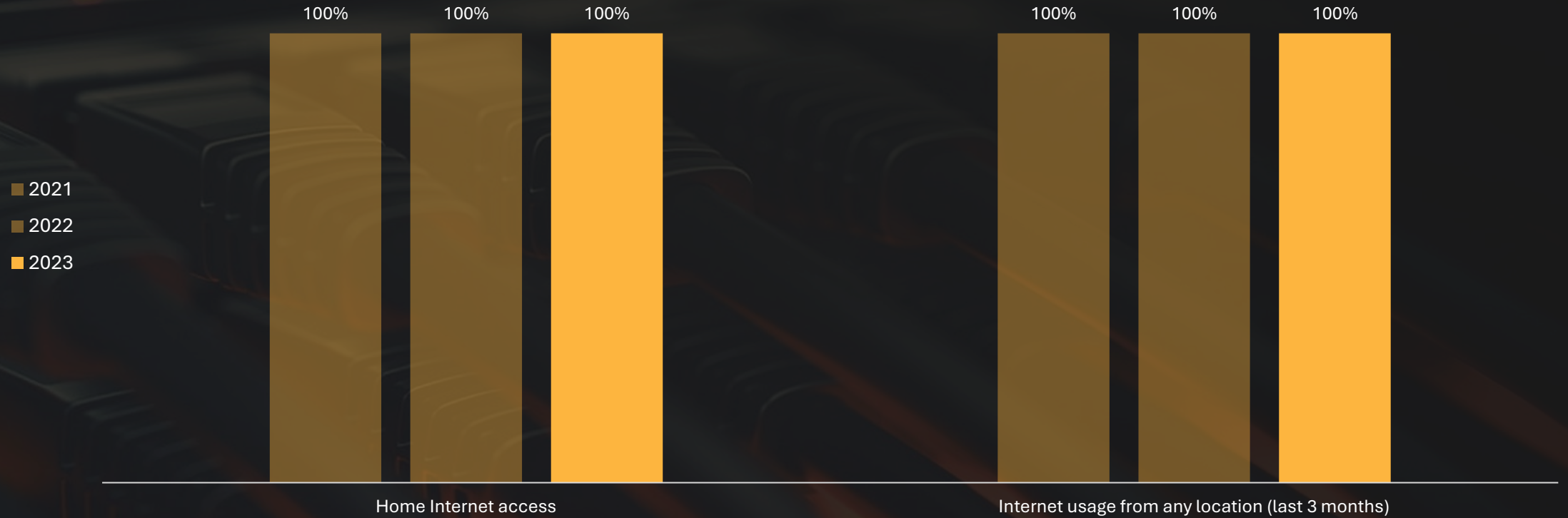
  
Internet  
Activities

  
Improvement  
Suggestions

## Internet services Key findings



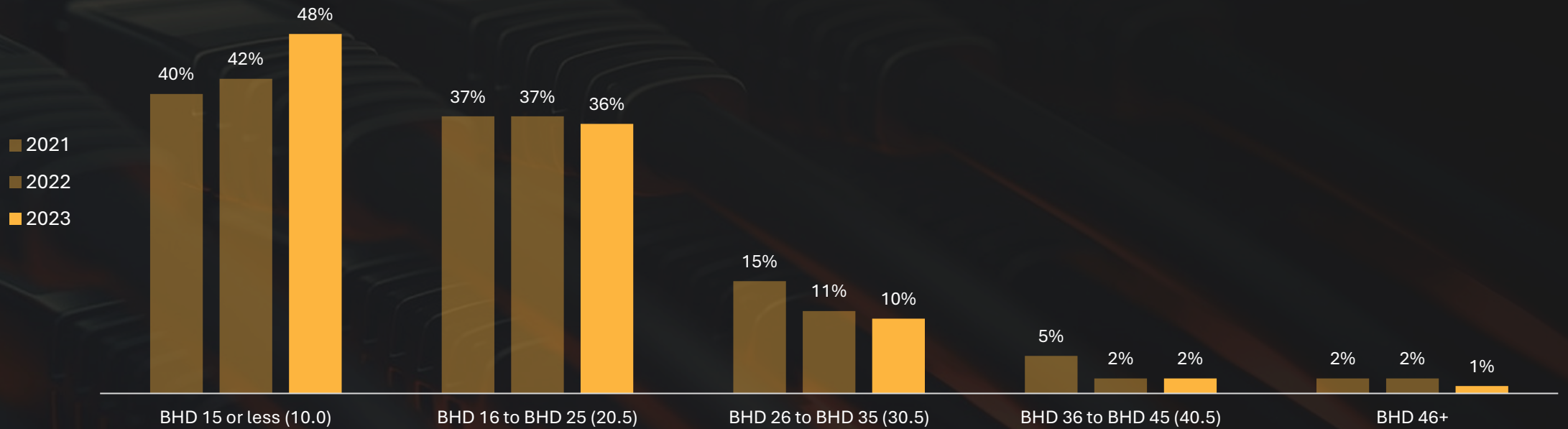
## Internet access and usage



# Internet usage Frequency

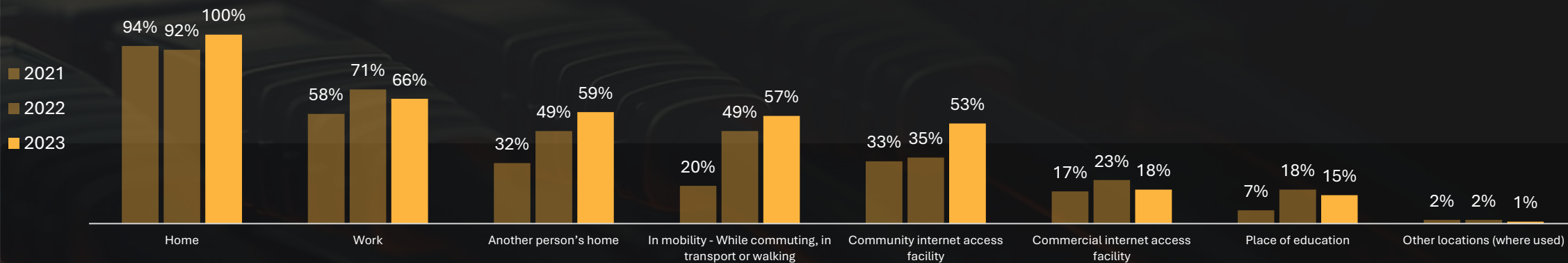


## Internet services Monthly spend

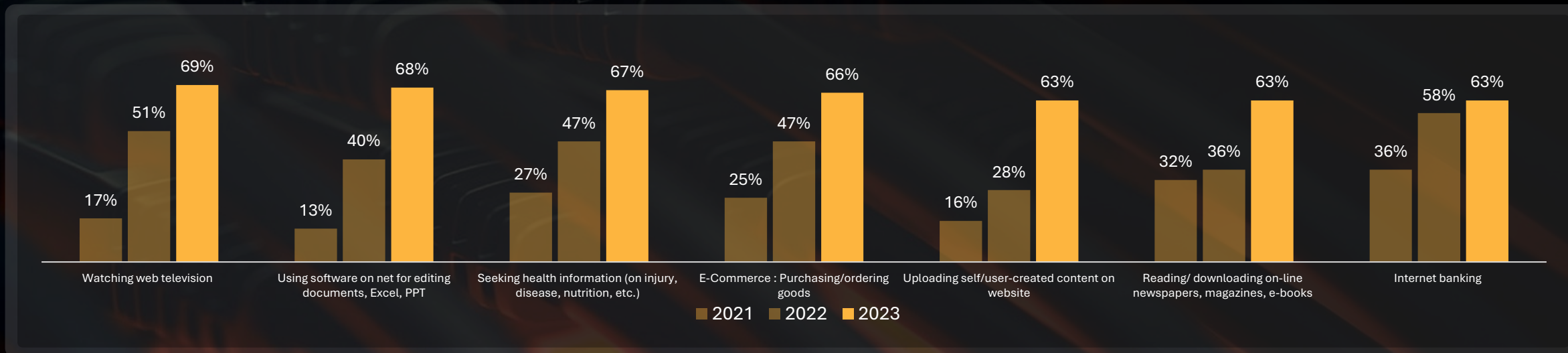
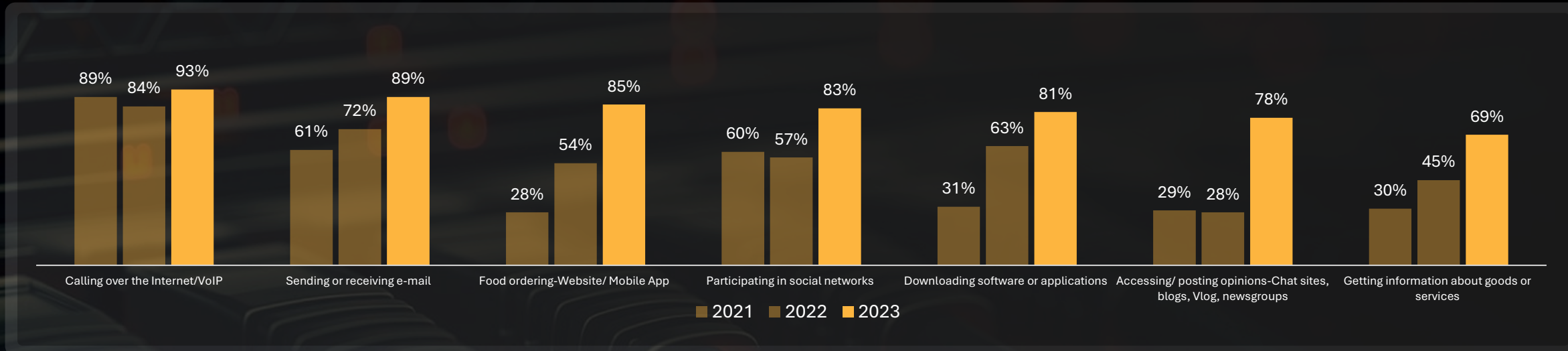


# Usage Summary

## Places using Internet

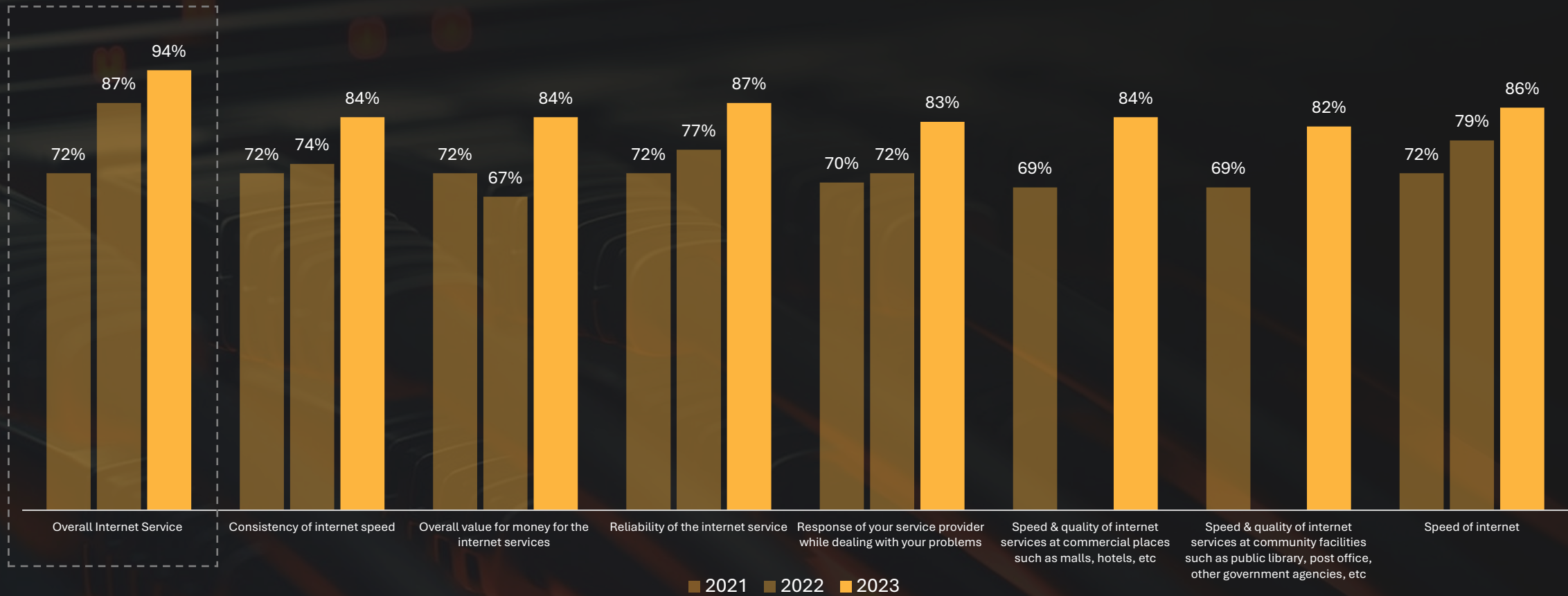


## Top Internet Activities



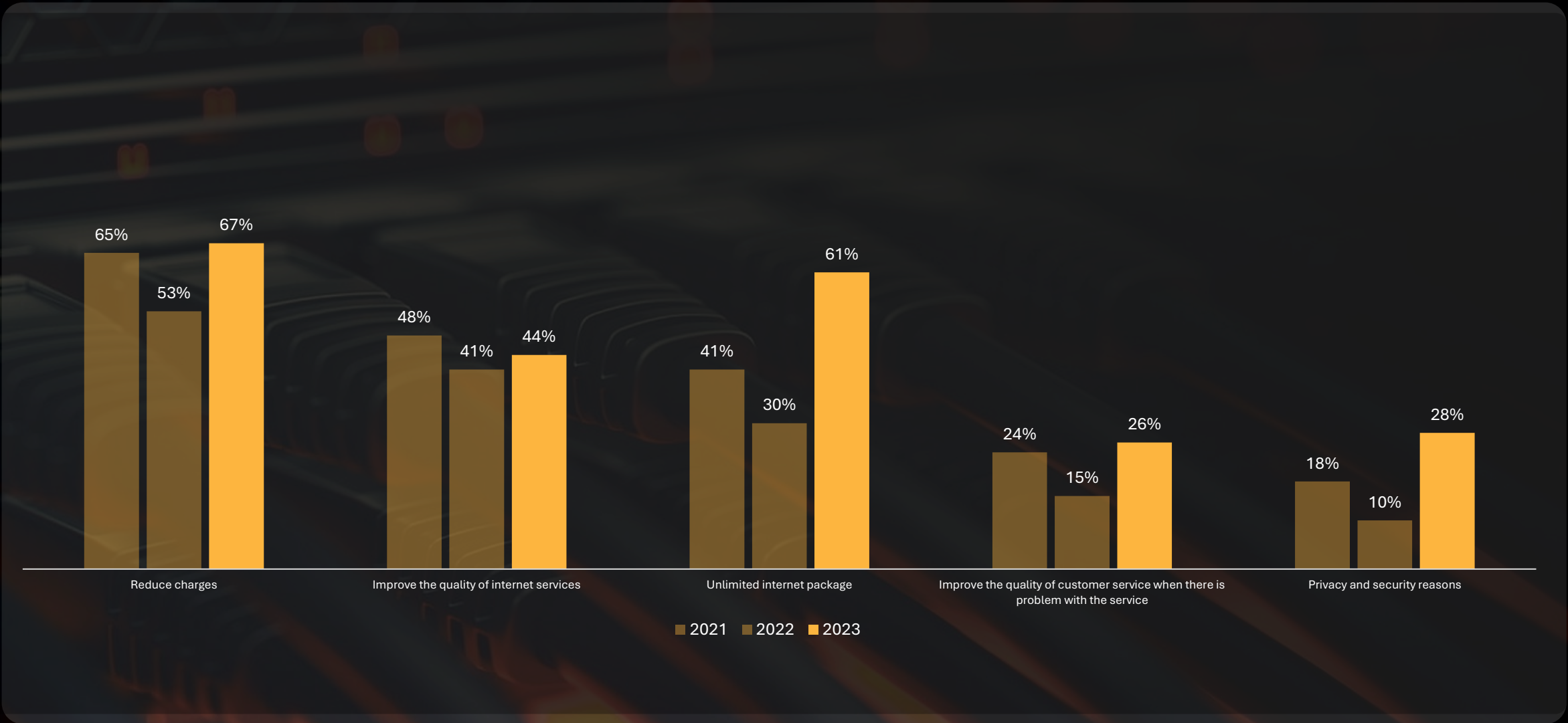
# Satisfaction with Internet Services

Top 2 Box



■ 2021 ■ 2022 ■ 2023

## Suggestions to improve Internet Services





# OTT Apps Service



KPI  
Scorecard



Usage  
Summary



Satisfaction  
Scores



OTT Apps  
Substitutes



Overall  
Scorecard



Mobile  
Services



Internet  
Services



Fixed Line  
Services

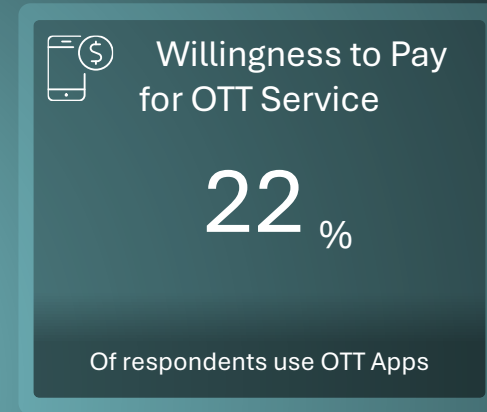
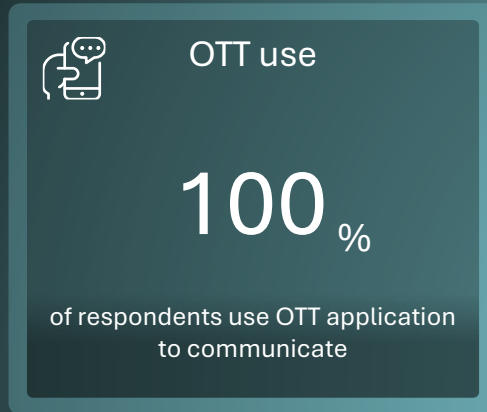


ITU  
Services



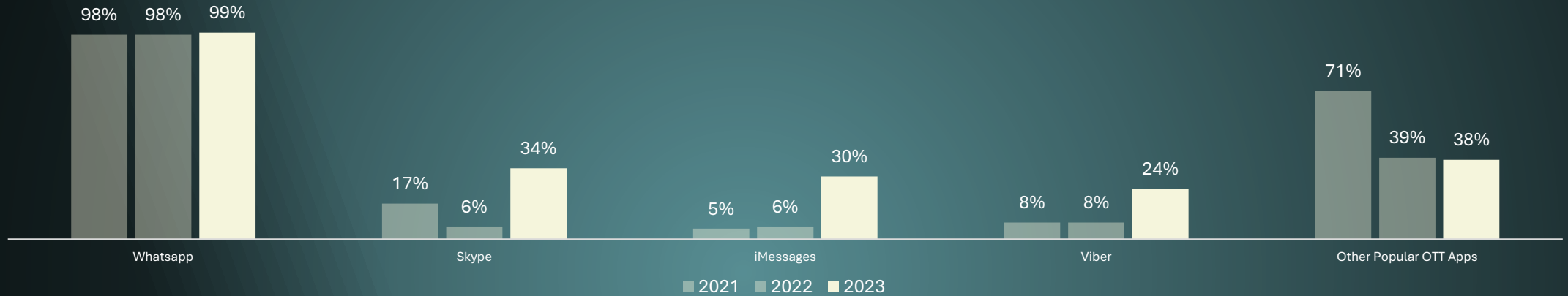
23  
Other  
Services

## OTT Key Findings

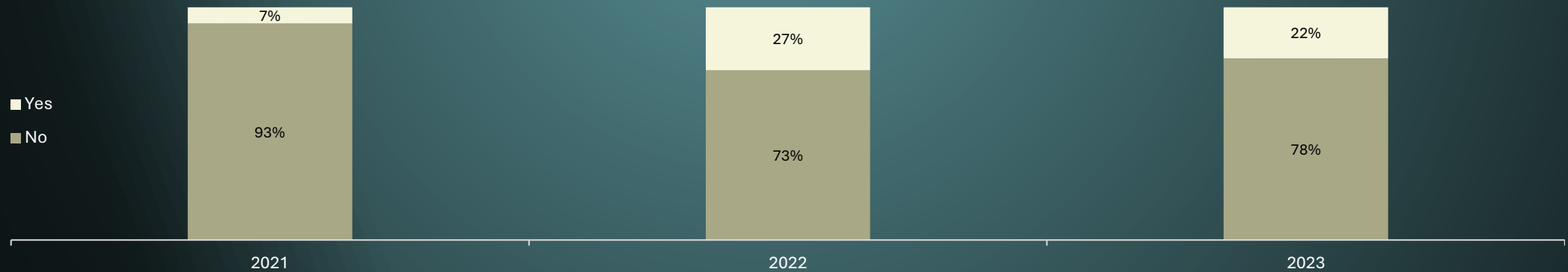


# Usage Summary

Types of OTT Communication Medium Used

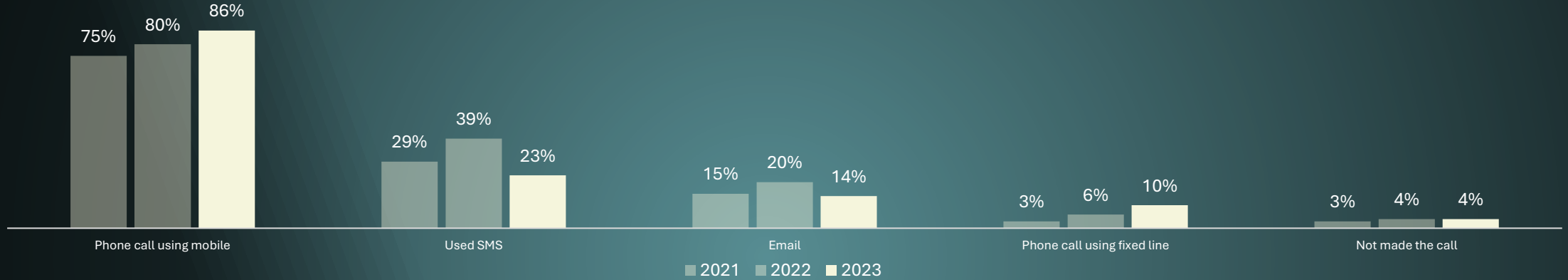


Willing to Pay Extra For Communicating Through OTT

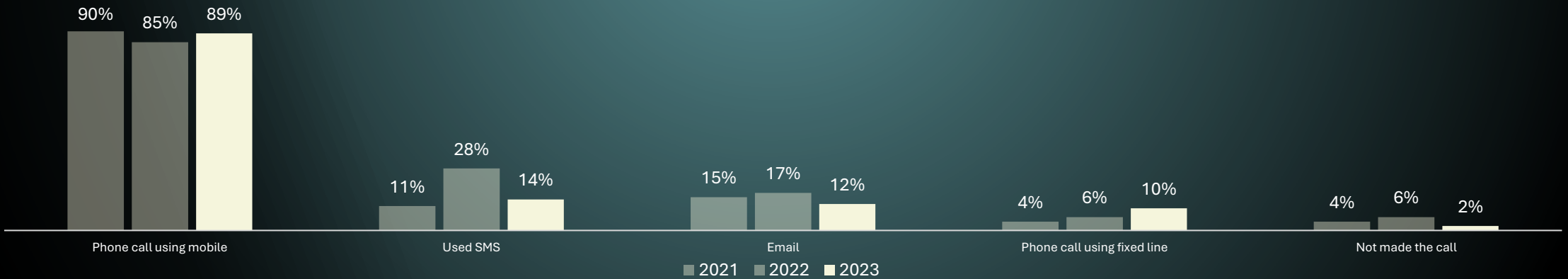


# OTT Apps Substitutes

## IM Substitutes



## OTT Call Substitutes



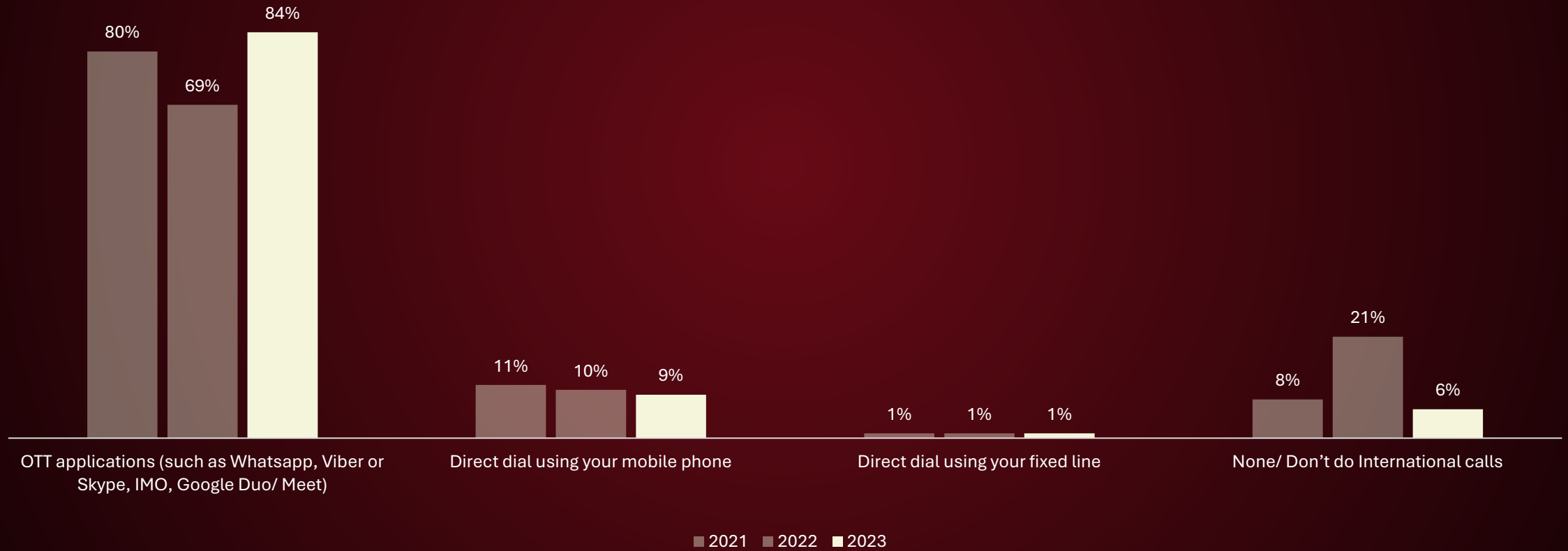


# Other Services



International Calls & Roaming

## Methods used to make International Calls



Overall Scorecard



Mobile Services



Internet Services



Fixed Line Services



OTT Apps



ITU Services

# International Calling

## Countries

Asian countries-(**58%**) and GCC countries-(ex. KSA, UAE, Kuwait, Qatar) (**47%**) are most popular calling destinations



## Mediums

**84%**

Of respondents use OTT apps to make international calls



## Roaming

**16%**

Of respondents used roaming services in last 12 months with a preference to use home SIM or WIFI options



## Countries to / from which international calls are made





# Fixed Line Services



KPI  
Scorecard



Usage  
Summary



Satisfaction  
Scores



Switching  
Providers



Improvement  
Suggestions



Overall  
Scorecard



Mobile  
Services



Internet  
Services



OTT  
Apps

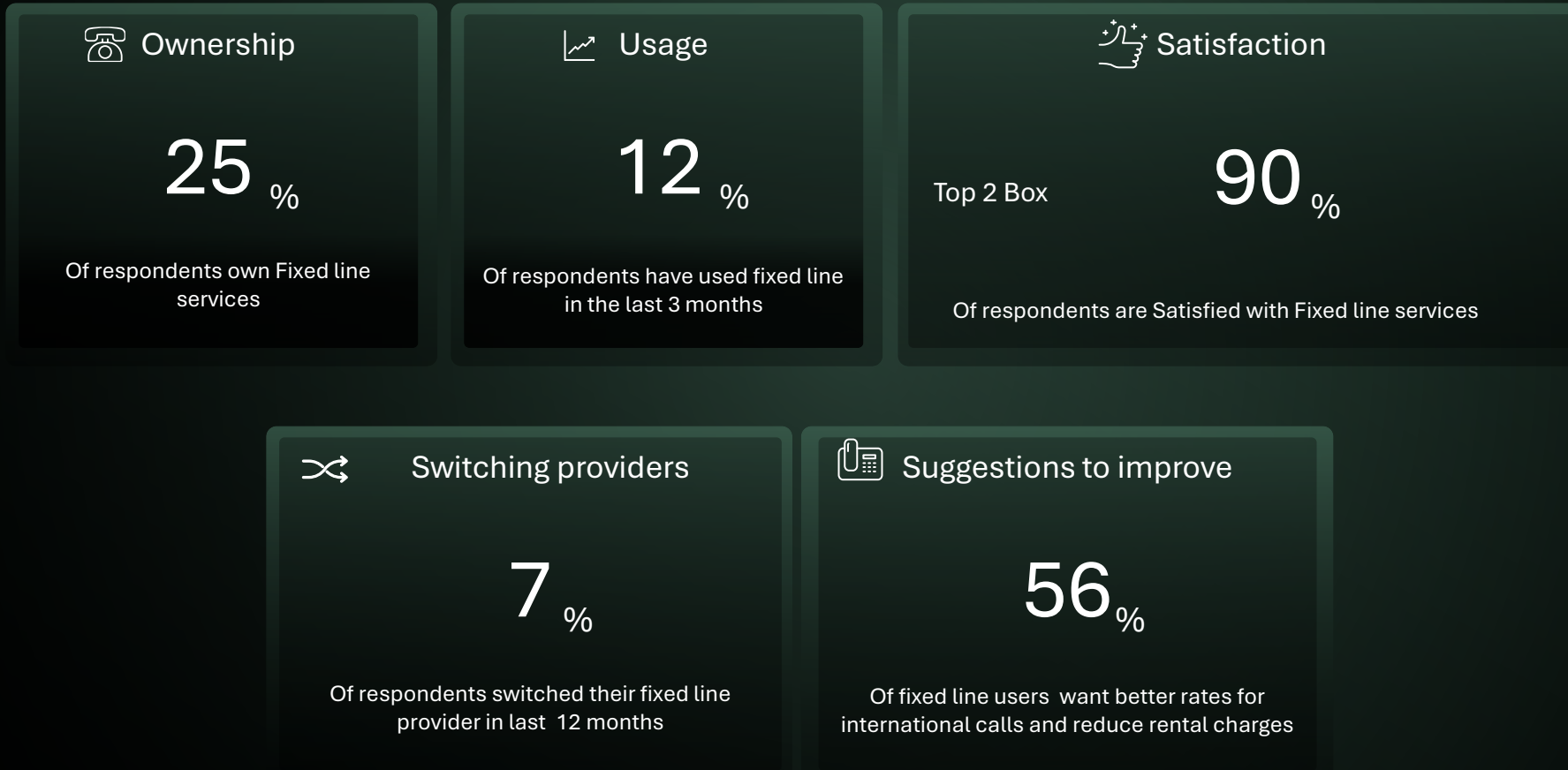


ITU  
Services



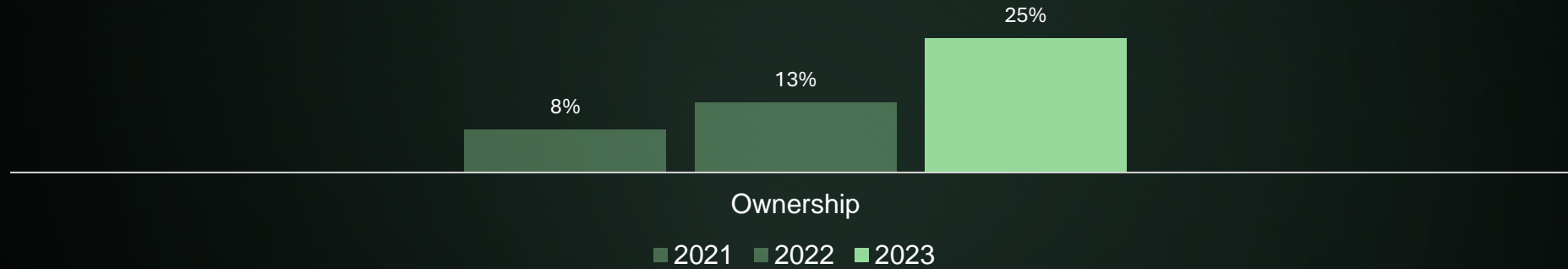
31  
Other  
Services

## Fixed line services - Key findings

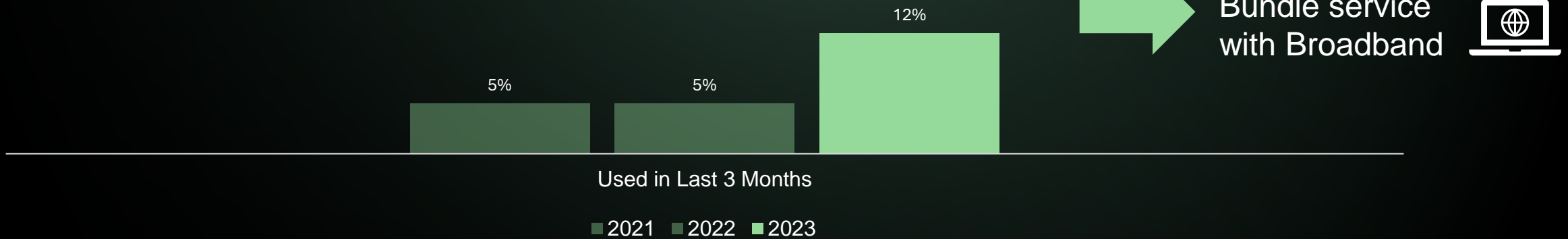


# Fixed line Ownership and usage

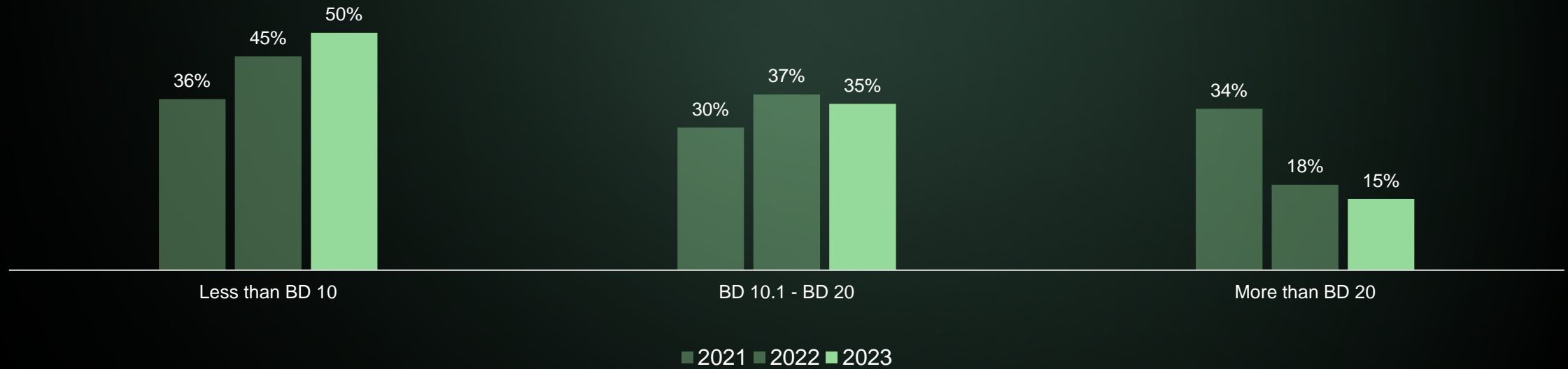
## Ownership of Fixed Line



## Usage of Fixed Line

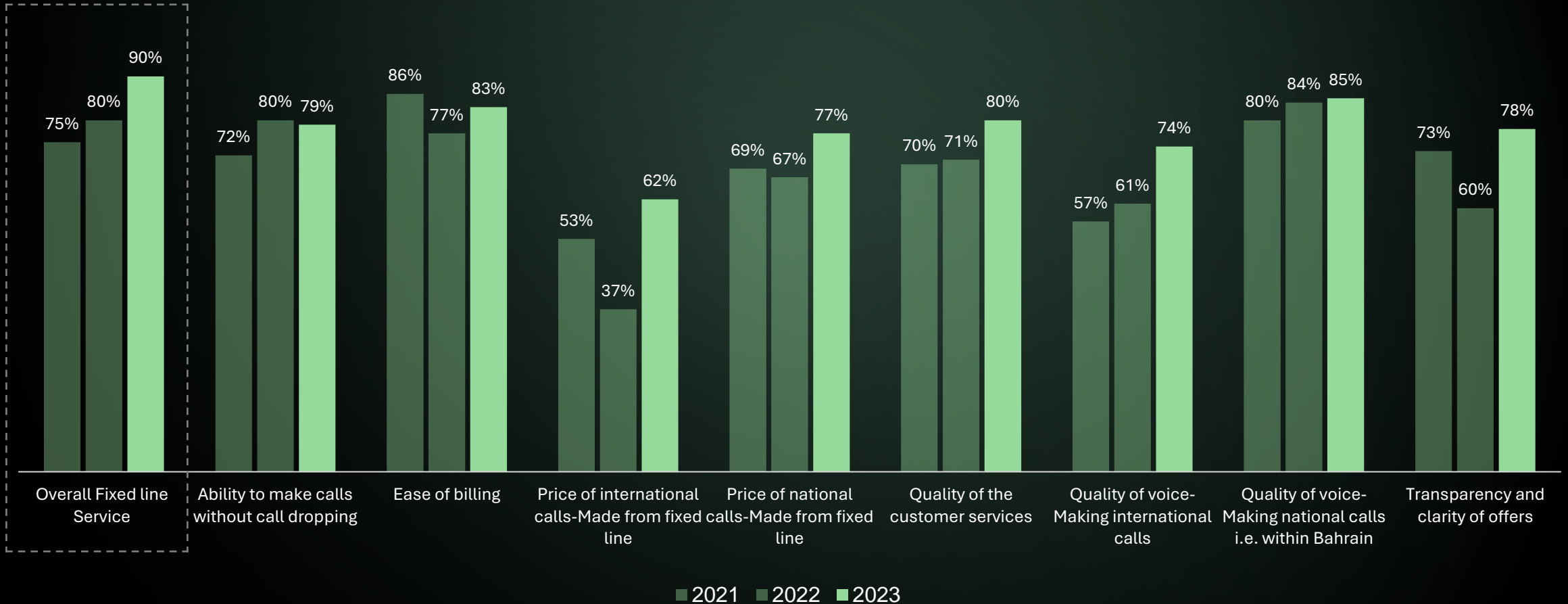


# Fixed line Services - Spend Summary

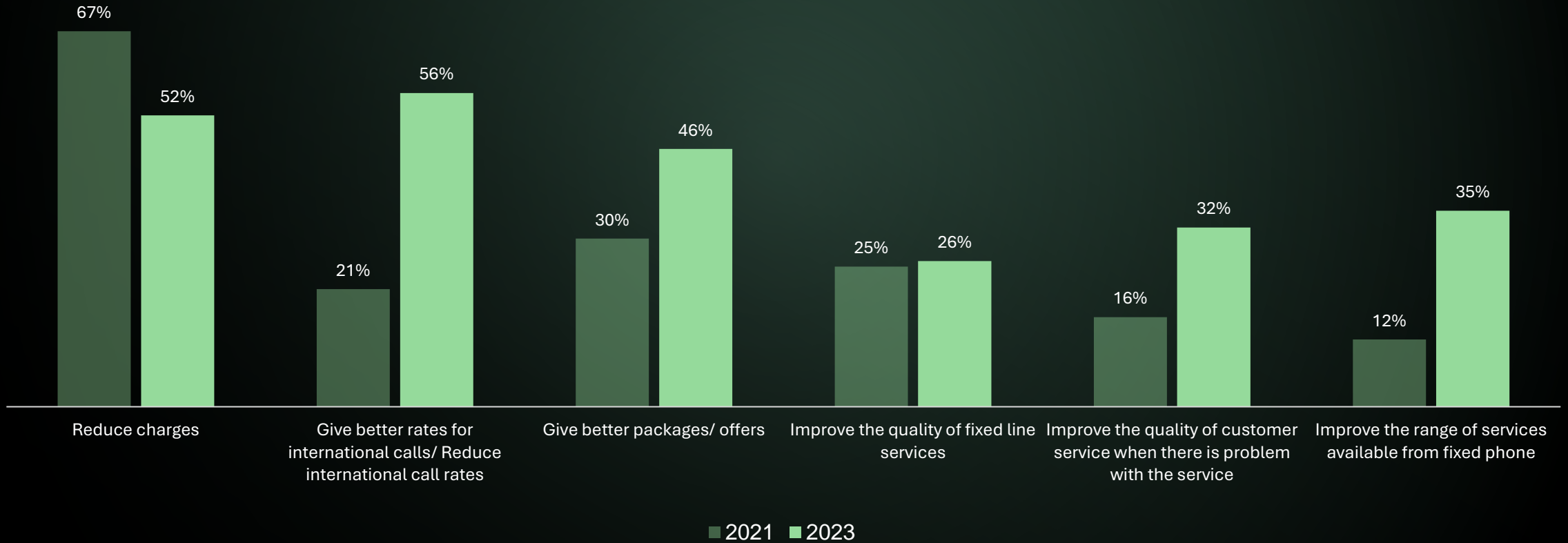


# Satisfaction with Fixed line

Top 2 Box



## Suggestions To Improve Fixed line Services



# Thank You

